

PROCEDURE 1380.02  
Issued: June 1, 2000  
Effective Date: June 14, 2000

SUBJECT: Project Management Methodology

APPLICATION: Executive Branch Departments and Sub-units

PURPOSE: The intent of this policy is to encourage best practices in project management and ensure project success. This policy provides a standard set of procedures for the management of Information Technology (IT) projects within the State of Michigan. The procedures are applicable to all IT projects, including software and infrastructure projects. Enhancements to existing systems as well as new initiatives are considered to be projects.

CONTACT

AGENCY: Department of Information Technology (DIT)  
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SUMMARY: This methodology was created to assist the State of Michigan's government agencies to manage and monitor their Information Technology (IT) projects by establishing formal project management practices.

This methodology provides a comprehensive set of procedures and techniques for the State's IT project managers. While broad in scope, the methodology is expandable to cover areas with greater specificity for large, complex projects.

This methodology consists of three components: the full methodology, the summarized Desk Reference, and the Project Management Templates. This methodology describes the Project Life Cycle and specifies the roles and responsibilities of the participants in each phase of the life cycle.

FULL

METHODOLOGY:

This methodology is a basis for a standard suite of processes and associated documents that will facilitate the implementation and control of project management phases at all levels of state government. This methodology document is considered an in-depth guide that describes how to initiate project documentation by stepping through the phases of a project and providing the necessary outlay of documents needed to support a particular project phase. The full methodology consists of:

Section 1 - Project Management Overview

Introduction

Project Management Methodology

Project Definition

Roles and Responsibilities

Information Technology Components for Project Overview

## Section 2 - Project Initiation Phase

- Introduction
- Overview
- Project Concept Document
- Project Charter
- Information Technology Components for Project Initiation

## Section 3 - Project Planning Phase

- Introduction
- Overview
- The Planning Process and the Project Plan
- Project Objectives and Scope
- Work Breakdown Structure
- Organizational Breakdown Structure
- Activity Definition and Sequencing
- Cost Benefit Analysis
- Resource Planning
- Project Schedule Development
- Risk Planning
- Procurement Planning
- Quality Planning
- Communications Planning
- Configuration Management Planning
- Budget Planning
- Planning Throughout the Project
- Project Planning Transition Checklist
- Information Technology Components for Project Planning

## Section 4 - Project Execution Phase

- Introduction
- Overview
- Executing the Project Plan
- Risk Monitoring
- Status Reporting
- Information Technology Components for Project Execution

## Section 5 - Project Control Phase

- Introduction
- Overview
- Configuration Management
- Change Control Systems
- Change Control Process
- Issues Management Process
- Information Technology Components for Project Control

## Section 6 - Project Closeout Phase

- Introduction
- Overview
- Administrative Closure
- Financial Closure

Financial Audit  
Celebration of Success  
Information Technology Components for Project Closeout

Project Templates  
Capability Maturity Model

#### DESKTOP

REFERENCE: An overview to the methodology document. Used as a reference for project managers, either for a single project or multiple projects for use on a day-to-day basis to guide them in managing their projects. The summarized Desk Reference consists of the following sections:

- Project Management Overview
- Project Initiation Phase
- Project Planning Phase
- Project Execution Phase
- Project Control Phase
- Project Closeout Phase
- Appendices

#### PROJECT TEMPLATES:

The Project Management Methodology Templates are:

- Project Feasibility Template
- Project Concept Document
- Project Charter
- Project Plan Format Template
- Project Scope Statement
- Critical Success Factors Template
- Work Breakdown Structure Template
- Cost Benefit Analysis Template
- Resource Plan Template
- Risk Plan Template
- Procurement Plan Template
- Quality Plan Template
- Communications Plan Template
- Configuration Management Plan Template
- Project Budget Estimate Template
- Sample IT Project Budget Estimate Template
- Project Planning Transition Checklist Template
- Project Status Report Template
- Executive Status Report Template
- Change Control Template
- Project Issues Template
- Post Implementation Evaluation Report Template

#### APPLICABLE

FORMS: None.

#### PROCEDURES:

## General Information:

### Agencies:

The goal of this policy is to give IT project managers guidance and better tools for ensuring the efficient use of resources and successful implementation of quality IT products. The focus is two fold: 1) to give agency management and technical personnel a road map for improving the timeliness and quality of IT products; and 2) to assure the delivery of technical information to technologists and management-level information to decision makers.

This policy requires that all newly initiated information technology based projects utilize this project management methodology. This methodology forms the core of the State's policy for management of information technology projects.

Agencies who currently have a comprehensive Project Management Methodology in place must notify the Office of Research and Policy of this exception to the standard. Research and Policy will review the exception and provide a written evaluation.

### Maintenance:

The Office of Research and Policy, through the use of a work group consisting of multiple state agency representatives, will review this standard every two years. Recommendations for changes will be sent to the Department of Information Technology.

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